Instructions: Exporting Query-Ready CalPlanning Reports into Smart View

To export Query-Ready CalPlanning reports into MS Excel Smart View for further ad hoc querying, follow the steps below:

1. From a CalPlan, CalRptg or HCPRptg report click on the Export in Query-Ready Mode link in the bottom right corner of the report.

2. Excel Smart View opens with Private Connections. From the Home drop down arrow select Shared Connections.

3. Select Oracle Essbase from the Shared Connections drop down and then select the desired CalPlanning module (CalRptg shown here) and click Connect.
4. Click on **Ad hoc analysis**.

5. Select **Reuse sheet contents and POV** to maintain the report POV and data.

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**Result**

You have a query-ready CalPlanning financial report available in MS Excel Smart View available for additional ad hoc querying, editing &/or formatting.